

REQUEST FOR APPLICATION (RFA)

Statewide Education Technology Services (SETS)

- Description of the project:** This Request for Application (RFA) seeks to identify a lead agency to provide professional development opportunities and resources for school and district technical support staff. The contract will be separated into two phases. Phase 1 focuses upon the collaborative production of a description or matrix of skills and resources needed by technical support staff. This description or matrix is to be approved by CDE. Phase 2 focuses upon using the description or matrix to establish an organized and comprehensive array of professional development opportunities and resources for the technology support staff.
- Eligible applicants:** School districts, county offices of education, or a consortium of districts and/or county offices of education may apply to be the statewide lead agency to provide this service to all local education agencies within the state. Partnerships or consortia that include the private sector are encouraged.
- Date/time/place for submission of applications:** An Intent to Submit (Form SETS-A) must be received by 5 p.m. on Friday, February 25, 2000, and applications must be received by 5 p.m. on Tuesday, March 7, 2000. All items must be submitted to:
- California Department of Education
Education Technology Office
515 L Street, Suite 250
Sacramento, CA 95814
- Contact person:** Larry Hiuga, lhiuga@cde.ca.gov, (916) 323-4629 or 323-5715
- Note: Questions must be submitted via letter or e-mail to the California Department of Education (CDE); CDE will send responses to substantive questions received by Friday, February 18, 2000, to all applicants that submit an "Intent to Submit" form.
- Applicants' conference:** CDE will host an optional conference in Sacramento for potential applicants on Tuesday, February 8, 2000, at 515 L Street, Suite 250, Folsom Room, starting at 10 a.m. and ending before 3:00 p.m.
- Source of funding:** This project is supported by state funds. Project funding is contingent upon allocation of funding in the state budget each fiscal year.
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TABLE OF CONTENTS

I. PROGRAM OVERVIEW	3
OBJECTIVES.....	3
BACKGROUND.....	3
ROLE OF THE STATE BOARD OF EDUCATION AND THE CALIFORNIA DEPARTMENT OF EDUCATION	3
II. GENERAL APPLICATION INFORMATION	5
CRITICAL DATES AND APPLICATION SUBMISSION INFORMATION.....	5
ELIGIBLE APPLICANTS.....	6
SCOPE OF SERVICES	6
AWARD PERIOD	6
LEVEL OF FUNDING.....	6
HOW FUNDING MAY BE USED	7
PAYMENT INFORMATION.....	7
BUDGET CHANGES	7
APPLICATION REVIEW AND AWARD PROCESS.....	7
III. HOW TO APPLY FOR FUNDING.....	11
INSTRUCTIONS FOR SUBMITTING AN APPLICATION	11
INTENT TO SUBMIT.....	12
APPLICATION SECTIONS AND FORMS.....	12
<i>Application Title Page.....</i>	<i>12</i>
<i>Drug-Free Workplace Certification.....</i>	<i>12</i>
<i>Service Work Plan.....</i>	<i>12</i>
Planning and coordination	12
Delivery of the SETS.....	13
Management, Staffing, and Advisory	14
Budget Narrative.....	16
Budget Forms.....	17
Evaluation System	17
IV. REQUIRED REPORTS AND MEETINGS.....	18
REQUIRED REPORTS AND PAYMENT INFORMATION.....	18
REQUIRED MEETINGS	18
V. MISCELLANEOUS CONTRACT TERMS AND REQUIREMENTS	19
STANDARDS FOR ACCEPTANCE OF PRODUCTS.....	19
RESPONSIBILITIES OF THE CDE	19
THE NONDISCRIMINATION COMPLIANCE STATEMENT (STD. 19)	19
COMPLIANCE AUDIT	19
STAFF REPLACEMENTS	19
OWNERSHIP OF MATERIALS	19
RETENTION OF RECORDS.....	19
ANTI-TRUST CLAIMS.....	20
RECYCLED PAPER CERTIFICATION.....	20
VI.....RATING CRITERIA AND EVALUATION	21
STEP I: APPLICATION FORMAT	21
STEP II: RFA PERFORMANCE EVALUATION SHEET	22

APPENDIX I: REQUIRED FORMS	26
SETS-A: INTENT TO SUBMIT	27
SETS-B: APPLICATION TITLE PAGE	28
SETS-C: DRUG-FREE WORKPLACE CERTIFICATION.....	29
SETS-D: PROFESSIONAL STAFF BY PROJECT ACTIVITY	30
SETS-E-1:BUDGET FORM: EXPENDITURES FROM CONTRACT FUNDS.....	31
SETS-E-2:BUDGET FORM: INCOME AND EXPENDITURES FROM FEES, THE LEAD AGENCY OR PARTNERS.....	32
SETS-F: NONDISCRIMINATION COMPLIANCE STATEMENT	33
APPENDIX II: ATTACHMENTS	34
ATTACHMENT 1: ADDITIONAL INFORMATION REGARDING PROFESSIONAL DEVELOPMENT AND RESOURCES FOR TECHNOLOGY SUPPORT STAFF	35
ATTACHMENT 2: APPLICANT’S CHECKLIST	38
ATTACHMENT 3: TRAVEL EXPENSE REIMBURSEMENT	39
ATTACHMENT 4: DRAFT MATRIX OF TECHNOLOGY SUPPORT STAFF SKILLS.....	41

Statewide Education Technology Services (SETS)

I. PROGRAM OVERVIEW

A. Objectives

The objectives for this Request for Application (RFA) are to:

1. Identify and describe the required products and services with sufficient detail so that applicant local education agencies (LEAs) may fairly and accurately compete for funding.
2. Identify through a competitive process which lead agency will best provide the required products and services.
3. Provide the basis for a recommendation to the State Board of Education for its April 12-13, 2000 meeting regarding the LEA best prepared to meet the requirements of this RFA, with the initial funding period commencing May 1, 2000.

The identified service for this RFA is:

1. Professional Development and Resources for Technology Support Staff

B. Background

Education Code Section 51872 (b) states that statewide education technology services (SETS) are to provide services which “address locally defined needs but that are more efficiently and effectively provided on a statewide basis.” In 1999, LEAs were selected to host regional CTAP operations. As part of that application and selection process, regional needs were assessed and prioritized. Through an analysis of these needs, plus input from others, the California Department of Education (CDE) recommended, and the State Board of Education (SBE) approved the four (4) SETS: Learning Resources, Arranging Discount Pricing and Coordinating Purchasing of State Licenses, Professional Development for District and Site Administrators, and Professional Development and Resources for Technology Support Staff. Contractors have been identified for the first three SETS and the final contractor is being sought for this fourth and final service.

CDE is issuing this RFA to select a lead agency for this service, commencing when the contract is approved by the Department of General Services (on or about May 1, 2000) and extending through June 30, 2001, with the possibility for additional funding between July 1, 2001 and June 30, 2002. Based upon the results of the evaluation of this RFA, CDE will make recommendations for funding to the SBE.

The CDE shall provide an annual report of the services provided by each lead agency to the SBE. The CDE shall recommend to the SBE those SETS to be renewed, discontinued, or added based in part on changing statewide technology needs.

C. Role of the State Board of Education and the California Department of Education

The SBE is responsible for approving policies related to the program and awarding project funds to districts or county offices of education based upon the requirements of the application. The CDE shall recommend to the SBE those SETS to be renewed, discontinued, or added at any time during the life of this legislation.

The CDE's Education Technology Office is responsible for administering the program. In this capacity, the CDE will be responsible for:

1. assisting the SBE on education technology plans, policies, programs, and activities;
2. providing for statewide coordination, planning, and evaluation of education technology programs and resources;
3. providing the service provider with necessary CDE publications and data;
4. advancing the use of technology in the curriculum and in the administration of elementary and secondary schools;
5. providing technical assistance;
6. monitoring project activities and expenditures, processing award notices and payments, and making a recommendation to the SBE regarding those SETS to be renewed, discontinued, or added; and
7. approving all materials or products developed under the terms of the SETS contract.

Note:

All products developed by the SETS must be in full compliance with Public Law 103-382 (Sections 3131-3135), accurate, and of high quality. All products must be submitted to the CDE in hard copy and electronically. Unless prior approval has been obtained from CDE, all products submitted to CDE electronically must be formatted in such a way that they can be opened using a CDE standard machine and using one of the CDE's standard software packages (for this RFA, PC-based Microsoft Office 97, Word 97).

II. GENERAL APPLICATION INFORMATION

A. Critical Dates and Application Submission Information

Intent to Submit: Completed Intent to Submit forms (Form SETS-A) must be in the possession of CDE's Education Technology Office no later than 5 p.m. on Friday, February 25, 2000.

Applications: Completed applications must be in the possession of CDE's Education Technology Office no later than 5 p.m. on Tuesday, March 7, 2000. Applications delivered by hand on the deadline date will not be accepted after 5 p.m. All applications must be received on or before that date to be considered. Late submissions will not be considered. Submittal of a proposal constitutes a release of information and waiver of the individual's right of privacy with regard to information provided in response to the RFA. Ideas and formats presented in any proposal will become the property of the CDE.

A summary of critical dates is provided in the following table:

Table 1: Timeline of Critical Dates

Date	Activity
January 24, 2000	This RFA is made available to school districts and county offices of education and others requesting a copy. This RFA will also be available on the CDE Web site.
February 8, 2000	Optional conference for potential applicants in Sacramento from 10 a.m. to (no later than) 3 p.m. at 515 L Street, Suite 250, Folsom Room.
February 25, 2000	Complete Intent to Submit (Form SETS-A) must be in the possession of the CDE's Education Technology Office no later than 5 p.m. (Note: This is a <u>required</u> part of the application process.)
March 7, 2000	Complete applications must be in the possession of the CDE's Education Technology Office no later than 5 p.m.
March 8-14, 2000	Applications read and scored.
March 15-16, 2000	The CDE finalizes the recommendations for funding SETS providers and forwards them to the State Board. Applicants are notified by fax at this time.
April 12-13, 2000	State Board meeting. SETS providers approved.
May 1, 2000	Anticipated date selected SETS provider begins first funded year. (See chart below for anticipated funding amounts through June 30, 2001.)

B. Eligible Applicants

Any school district, county office of education, or a consortium of districts and/or county offices of education may submit an application in response to this RFA. Partnerships or consortia that include professional organizations and/or the private sector are encouraged. In this RFA, the applicant may be referred to as "applicant," "service provider," "contractor," "lead agency," "bidder," or "awardee."

C. Scope of Services

It is anticipated that the State Board will fund one application for this service. Applications must address how services are to be provided on a statewide basis. Applicants should be aware that they must apply to serve as service provider for all the school districts and county offices of education. CDE expects the contractor to take the diverse needs of California into account and to develop services to meet the needs throughout the state. The main components for this service are delineated in Section III. C. 3, "Service Work Plan," and in Attachments 1 and 4.

D. Award Period

For the purposes of this RFA, the first year of the contract shall be the date the Department of General Services approves the contract through June 30, 2001; this means that the first year of the contract is more than one year (i.e., approximately May 1, 2000 through June 30, 2001). The second year shall be July 1, 2001 through June 30, 2002. Additional contracts in subsequent years may be approved contingent upon: (a) a continued need for the statewide service(s), (b) satisfactory completion of the annual reporting and recertification processes, and (c) allocation of sufficient funding in the State budget. In the first and subsequent years, the SBE reserves the right to fund applications at a lesser amount if the application can be implemented with less funding or if the funding is needed for a higher priority service. It is also possible that recommended applicants will be contacted by CDE and asked to negotiate one or more budget items if in the opinion of CDE the proposed expense(s) is not consistent with the Service Work Plan and/or the objectives of the program. The CDE reserves the right to recommend to the State Board of Education the cancellation of any award, or a decrease funding, with a 30-day written notice to the service provider.

E. Level of Funding

SETS	Amount for initial period (05-01-00 through 06-30-01)	Anticipated amount for 12-month period (07-01-01 through 06-30-02)
(1) Professional Development and Resources for Technology Support Staff	\$474,900** (**See Special Notes below)	\$300,000

****Special Notes:**

(1) In the initial period, this contract is separated into two phases, each with deliverables. A contractor is not entitled to any Phase 2 funding until Phase 1 deliverables have been approved by the CDE. It is anticipated that up to \$174,900 will be used for Phase 1 work which has an approximate 3-4 month life (May 1, 2000 through September 1, 2000) and that \$300,000 will be used for Phase 2 work (September 1, 2000 through June 30, 2001).

(2) After June 30, 2001, recommended funding levels for July 1, 2001 through June 30, 2002, estimated to be \$300,000, will be based on a variety of factors, including, but not necessarily limited to, allocation of funding in the State budget, statewide needs, results of evaluations, and progress toward fiscal self-sufficiency. Applicants should also be aware that because funding is contingent upon allocation of funding in the State budget, the amounts may be subject to change.

F. How Funding May Be Used

Funding may be used for staff, substitutes or staff/administrator stipends, materials, services, training, equipment, supplies, evaluation, transportation, or other purposes consistent with the approved application, except that indirect costs cannot exceed the rate approved by the CDE for the lead agency for the appropriate fiscal year. In addition, if the budget includes any out-of-state travel, justification must be included in the budget narrative (Section III, C, 3, Plan Section D) and approved by the CDE.

All travel costs and related expenses supported by this project shall be reimbursed at rates not to exceed those established for CDE's nonrepresented employees, computed in accordance with and allowable pursuant to applicable Department of Personnel Administration regulations. (See Attachment 4.)

Funding should be spent in the fiscal year in which it is received according to the approved application and budget. The annual report to the SBE must include a description of the funds expended during the year and the services provided with those funds. The SBE reserves the right to decrease funding in subsequent years if it appears that a lead agency does not need all of the funding allocated to it.

G. Payment Information

Payments will be made in arrears on a monthly basis upon receipt of an itemized invoice and a progress report of activities. The CDE shall retain from each payment an amount equal to 10 percent of the payment. Final payments will not be made until acceptance of all contracted work and completion of a Std. 4 Contract/Contractor Evaluation by the state contract monitor.

H. Budget Changes

Surplus funds from a given line item of the budget, up to 10 percent of that line item, may be used to defray allowable direct costs under other budget line items with prior CDE approval. Any budget line item change of more than 10 percent requires a contract amendment and approval by the State Department of General Services if required by State law or policy. Changes cannot be made which increase the rates of reimbursement.

I. Application Review and Award Process

Each application will be evaluated using a two-step process to determine responsiveness to the requirements and standards as described in this RFA. Consistent with the requirements of this RFA, the CDE reserves the right to not recommend any or all applications to the SBE for funding. Nothing herein requires the granting of an award for each service in response to this RFA. In the event a lead agency is not selected for this service, another round of applications may be solicited and any previous applicants will be allowed to strengthen their applications and resubmit them for reconsideration, along with any new applications that might be submitted at that time.

In Step I, "Application Format," applications will be evaluated on a yes/no basis as described below. If more than one application has been received for a service, receipt of a "no" will result in elimination of the application from further consideration. If only one application has been received and that applicant receives a "no" in Step I, that applicant will be contacted and will be required to fax the corrected section of the application by 5 p.m. of the second business day following the day of the request from CDE.

In Step II, "Performance Evaluation," a review panel will score applications using the Rating Criteria included in this RFA.

The highest scoring application may be recommended to the SBE for funding. Nothing herein requires the granting of an award in response to this RFA. The CDE reserves the right to not recommend any or all applications to the SBE for funding, based on the contents and quality of the application as determined by the CDE, regardless of the score(s) achieved during the evaluation process. In the event an application that receives fewer than 75 percent of the total points is recommended for funding, the application may be recommended for conditional approval. The lead agency will be required to work with the CDE to strengthen the Service Work Plan in the weak area(s), and funding will be withheld until the program plan has been strengthened to the CDE's satisfaction.

Step I, Application Format

Applications will be screened for compliance with the following format requirements:

1. The applicant must have submitted an "Intent to Submit" form by the February 25, 2000 deadline.
2. Fifteen (15) copies plus one original, for a total of sixteen (16), must be submitted by the March 7, 2000, deadline.
3. All required components, forms, and attachments, including resumes for project staff and/or prospectus for project staff to be hired, must be included.
4. The title page of the application must be signed by an authorized representative of the applicant district or county office.
5. All pages, including all narratives, forms, resumes for project staff and/or prospectus for project staff to be hired, and required attachments, must be sequentially numbered. Note: Hand-written page numbers are acceptable.
6. All narrative pages of the Service Work Plan and the Budget Narrative must include line numbers. Pages should be individually numbered, with the first line of each page being line #1. Note that resumes for project staff and/or prospectus for project staff to be hired and required attachments are not considered part of the narrative and do not have to be line-numbered.
7. All narrative pages of the Service Work Plan and the Budget Narrative may not contain more than 24 lines per page. If tables or graphics are included, the number of lines of text on the page must be decreased to provide room for the tables or graphics. Additionally, any charts must not increase the word count for the page to exceed the number typically found on a page with 24 lines of text.
8. The Service Work Plan narrative may not exceed fifteen (15) total pages, exclusive of the required forms and attachments, including resumes and/or prospectus for project staff to be hired.
9. The budget narrative may not exceed four (4) total pages, exclusive of the required forms.

Penalty for failure to comply with requirements of Step I (Applicant Format):

If more than one applicant for a service: Applications that do not comply with the format requirements will be disqualified from the competition. Disqualified applications will not be scored. Applicants will not be allowed to correct deficiencies and resubmit their application for consideration in this round of competition.

If only one applicant for a service: Applications that do not comply with the format requirements will be called on the telephone and informed of the error. To maintain their eligibility in this round of competition, applicants will be required to submit the missing or corrected item(s) via fax by 5 p.m. of the second business day following the day of the request from CDE.

Project applicants are encouraged to format applications in a professional and easy-to-read manner. For example, it is recommended that a minimum font size of 12 be used to promote readability. It is also recommended that each application section be clearly labeled and that each page be double spaced.

Reviewers will have a limited time to read each application. Their reading time will be limited to the components described in Section III, Item C: "Application Sections and Forms." Any appendix or supplementary materials not specifically required should not be submitted. If submitted, these items will be pulled from the application package. These items will not be reviewed when the application is scored, nor will they be returned to the applicant.

Step II, Performance Evaluation

During March 2000 applications will be evaluated and scored based upon the rating criteria included in this application. A panel of approximately five (5) readers appointed by CDE will score each application. These readers will represent appropriate and necessary education technology leadership groups and constituencies. Readers must not have a conflict of interest nor shall they be employees of or paid consultants to school districts or county offices of education applying. Each reader will score each application independently. The readers will then discuss the application and write comments together. If the total scores for each application are identical or if the range of the scores is 25 points or less, the scores are "in agreement" and will be averaged to yield the total score from the readers. If the range of the readers' scores exceeds 25 points and the readers are not able to resolve the differences, the scores from this panel will be set aside. The application will be re-scored by a new panel of three other readers. This panel will read the application until the readers are able to assign scores that are in agreement.

By March 16, 2000, applicants will receive via fax the results of the evaluation and a notice of the proposed lead agencies to be service providers. A notice of the proposed lead agencies will be posted on Thursday, March 16, 2000, at:

California Department of Education
Education Technology Office
515 L Street, Suite 250
Sacramento, CA 95814

In the event an applicant wishes to protest the recommendation prior to that recommendation being presented to the SBE, the applicant must file a protest within five (5) working days of the notice of the proposed lead agencies. Only those agencies that submitted applications may protest the award. Protests shall be limited to the grounds that the CDE failed to correctly apply the standards for reviewing the format requirements or the review panel failed to correctly apply the standard for evaluating the applications as specified in the RFA. The protesting applicant must file a full and complete written protest, including the issue(s) in dispute, the basis for the agency's position, and the remedy sought. Protests must be addressed to:

Nancy Sullivan, Manager
Education Technology Office
California Department of Education
515 L Street, Suite 250
Sacramento, CA 95814

The Education Technology Office will forward appeals to the Chief Deputy Superintendent (or the Chief's designee) who will meet with another deputy and a representative from the CDE Legal Office in an open meeting to decide how the protest is to be handled. Their decision shall be the final administrative action afforded the protesting agency prior to the recommendation being forwarded to the State Board of Education.

The recommended SETS contractor will be presented to the SBE for action in April 2000. Any applicant that wishes to address the SBE regarding the status of its application may do so by following the standard SBE procedures. For more information contact:

State Board of Education
721 Capitol Mall, Room 532
P.O. Box 944272
Sacramento, CA 94244-2720

The contract period for approved applications will be the date the contract is approved by the Department of General Services (anticipated to be on or about May 1, 2000) to June 30, 2001. Additional funding may be provided to successful applicants for the periods of July 1, 2001 through June 30, 2002. Funding beyond June 30, 2001 is contingent upon: (a) a continued need for the statewide service(s), (b) satisfactory completion of the annual reporting and recertification processes, and (c) allocation of sufficient funding in the State budget.

Applicants will be notified no later than Friday, April 14, 2000, of the SBE action at the April Board meeting. The LEA for applications selected for funding will be required to sign a contract with the State of California.

III. HOW TO APPLY FOR FUNDING

A. Instructions for Submitting an Application

1. Due Dates

Intent to Submit: A complete Intent to Submit form (Form SETS-A) must be in the possession of the CDE's Education Technology Office no later than 5 p.m. on Friday, February 25, 2000. Completion of this form is a mandatory part of the application process. A fax submission is acceptable.

CDE will send responses to substantive questions to the applicants that return the Intent to Submit form. CDE will also post a list of applicants that returned an Intent to Submit form by the due date on the Education Technology Office Web page: <http://www.cde.ca.gov/sets/>.

Potential applicants should be aware that there is no penalty for forwarding an Intent to Submit form on or before the deadline and then, subsequently, withdrawing that intent. In the event a potential applicant indicates an intent to submit and later decides not to submit an application, that potential applicant is encouraged to notify CDE of the intent not to participate in the application process. CDE will update the list of applicants on the Education Technology Office Web page if it receives notification of a change in potential applicants.

Applications: Completed applications must be in the possession of the CDE's Education Technology Office no later than 5 p.m. on Tuesday, March 7, 2000.

Mailing address for applications:

California Department of Education
Education Technology Office
515 L Street, Suite 250
Sacramento, CA 95814

Applications delivered by hand will be accepted daily at the above address between the hours of 8 a.m. and 5 p.m., except Saturdays, Sundays, or State holidays.

2. Number of Copies to Submit

Intent to Submit: Only one Intent to Submit form needs to be submitted.

Applications: All applicants are required to submit one (1) signed original (labeled as "original," unbound and suitable for photocopying) and fifteen (15) copies of the application. The original and each copy of the application must be covered with a Title Page (included as Form SETS-B in this application) or a reasonable facsimile. Except for the one unbound original referenced above, all copies of the applications must be stapled or bound in such a manner that the application is flat. Do not submit applications in binders.

3. Applicant's Checklist

An Applicant's Checklist is included as an attachment to this RFA. This checklist is intended to assist the applicant in verifying that all required components of the application are included in the application package. This checklist also includes due dates to highlight when the Intent to Submit and the application are due. Applicants are not required to complete this form, nor are they required to submit it with the application package.

B. Intent to Submit

Applicants must use the Intent to Submit form (Form SETS-A) provided in this application. This page is not scored. The contact person listed on this form should be someone who can respond to requests for information regarding the application.

C. Application Sections and Forms

Applications must contain the following:

1. Application Title Page (Form SETS-B): Applicants must use the title page provided in this application or a reasonable facsimile. This page is not scored. This page must be signed by the individual qualified to make the offer to perform the work described. The individual signing this letter must indicate his/her position title. The primary contact person listed on this form should be someone who can quickly respond to requests for information regarding the application.
2. Drug-Free Workplace Certification: (Form SETS-C) must be signed as a condition of receipt of the contract. However, this form need not be signed and included with the proposal but may be submitted with the proposal if the applicant so chooses. This page is not scored.
3. Service Work Plan: This section is scored for a total of 100 points. The number of points assigned to each of the six required subsections is included below. In total, the Service Work Plan must describe in detail the tasks and activities to be undertaken during the entire term of funding in order to accomplish the purpose of the project and produce the required final products. Any anticipated theoretical or practical problems associated with the completion of each task must be discussed, and solutions, alternatives or contingency plans related to these problems should be proposed as appropriate. The work plan must include proposed task initiation and completion dates and levels of effort (i.e., hours) by task for proposed personnel.
 - a. Planning and coordination. (15 points) In this section, the applicant must address:
 - (1) the applicant's capacity to predict needed services, short-term and long-term;
 - (2) the applicant's capacity to adjust and allocate resources and priorities throughout the life of the program to best deliver the service;
 - (3) the active outreach or marketing process that will be used to apprise clients of the service(s);
 - (4) how the applicant will work in concert with other appropriate state-funded educational technology programs (particularly any other SETS funded through this legislation, Digital High Schools, and CTAP Regional Services), and with other appropriate federally-funded programs and initiatives (particularly E-rate and Technology Literacy Challenge) to minimize duplication and maximize resources; and

b. Delivery of the SETS. (40 points)

In this section, the applicant must address the specific work that will be done to deliver this service. The intent is to provide, through partnerships with the private sector and others, access to skill-building professional development opportunities and resources for technology support staff in order to build the capacity of districts and schools to support their education technologies. The result will be twofold: (1) a better trained cadre of existing technology support staff, and (2) an increase in the number of trained technology support staff statewide.

The contract will be separated into two separately-funded phases of deliverables. Phase 1 focuses upon the collaborative production of a description or matrix of skills and resources needed by technical support staff. This description or matrix is to be approved by CDE. Phase 2 focuses upon using the description or matrix to establish an organized and comprehensive array of professional development opportunities and resources for the technology support staff.

In this section, the applicant must respond to questions “a” and “b” under Phase 1 and questions “a” through “d” under Phase 2.

Phase 1 (to be accomplished approximately 3-4 months after contract issuance)

(a) How will the applicant work with key entities (both public and private) that have expert knowledge of the skills and resources needed by technology support staff in order to produce a description or matrix of those resources and skills? (See: Attachment 4 for a sample). How will this development process address review and approval by CDE?

Notes

✓ Recent legislation (AB 598) created the Commission on Technology in Learning (CTL) and requires that each school district receiving CDE technology grant funding must have a technology plan by January 1, 2002. The CTL will make recommendations to the State Board of Education (SBE) in such areas as statewide technology planning. By October 1, 2000, the CTL is to recommend guidelines and criteria to the SBE regarding school district technology planning.

✓ The contractor for this service will be required to work closely with the CDE so as to assist rather than duplicate the CTL's work. This may involve adjusting timelines concerning development of technical infrastructure resources. See **Attachment 1, Section II** for specific references to these deliverables.

(b) How will the applicant establish and maintain a process throughout the life of the contract whereby the description or matrix will be amended, updated, and then reviewed by the CDE as new information becomes known?

Phase 2 (to be accomplished by June 30, 2001)

Notes

- ✓ Sections (a) and (b) below are to be accomplished by the contractor, with appropriate collaboration among vendors, other SETS, professional organizations, and other projects, groups, or individuals.
- ✓ Section (c) lists the other SETS with whom the contractor is expected to establish clear working relationships for advice and/or the providing of specific subcontracted services to help the contractor with specific deliverables. The contractor may choose to subcontract with one or more of these SETS to provide specific goods or services.
- ✓ Although the other SETS are starting points for collaborative work, the contractor is expected to partner with any appropriate vendor, professional organization, project, group, or individual as necessary to yield the highest quality product.

(a) How will the applicant use the description or matrix of those resources and skills approved by the CDE to identify existing skill-building professional development opportunities and resources for technology support staff?

(b) How will the contractor identify gaps between what is available and what is needed and work collaboratively with others to fill those gaps? Although the contractor is ultimately responsible for accomplishing the deliverables, it is expected that the contractor will engage in activities with the three (3) other SETS contractors, each having expertise and systems of value in accomplishing specific services. It is appropriate that the applicant consider collaborating or subcontracting with or more of these other SETS contractors for specific services, if that method seems most efficient or effective.

- ✓ In order to identify the gaps between what is available and what is needed for school administrators, partner first with Professional Development and Resources for District and Site Administrators, Santa Cruz County Office of Education.
- ✓ In order to establish an evaluation or rating system for the skill-building professional development opportunities, partner first with Learning Resources, Stanislaus County Office of Education.
- ✓ In order to negotiate with providers to “fill the gaps,” partner first with Arranging Discount Pricing and Coordinating Purchasing of State Licenses, Monterey County Office of Education.

(c) How will the applicant locate, evaluate, and publish an easy-to-use set of resources on planning and installing common education technology infrastructure? See Attachment #1 for additional information.

(d) How will the applicant publicize and disseminate the approved description or matrix of skills and resources needed by technology support staff, as well as professional development opportunities and resources to reach the widest audience of technology support staff?

- c. Management, Staffing, and Advisory. **(20 points)** Together with Form SETS-D, “Professional Staff by Project Activity,” the information in this section must address the internal

management, staffing, and the advisory group process for the project work in sufficient detail to demonstrate how this plan will ensure accomplishment of the tasks.

- (1) This section of the application must also include a plan for internal management of the project. This section must also include a staff organizational chart that identifies staff by name to be assigned to the project, lines of approval authority, and the name of the person to act as project director. This organization chart is limited to one page in length and must be included as Attachment 1 to the application.
- (2) This section of the application must identify the individuals proposed to fill professional positions, explain the expertise of these individuals to complete the work described in the Service Work Plan, and give an explanation of how the proposed staff will provide the service year round. In addition to the narrative in this section, the application must include Form SETS-D “Professional Staff by Service” and resumes for each professional project personnel.

Form SETS-D is to be completed with the staff to be assigned to the project by name, current agency, title, and the full-time equivalent (FTE) to be devoted to the service, as well as the amount of time (i.e., hours) to be devoted to each aspect of the Service Work Plan and the total hours to be worked per year. Form SETS-D is to be included in the forms section of the application; it need not be included in the narrative section of the Service Work Plan. This form need not include clerical staff.

The resumes and/or prospectus for professional project staff to be hired should be included as Attachment 2 to the application. Each resume must be sufficiently detailed to allow an evaluation of the person's competency and expertise. In the event staff is to be hired following the award of the contract, in lieu of a resume the application must include a prospectus explaining the qualifications and experiences for each professional project staff to be hired. Applicants should be aware that each individual does not have to have expertise in all of the areas; however, the collective staff that will be providing services under this project must have the expertise necessary to successfully implement the Service Work Plan. Any resumes and/or prospectus for professional project staff to be hired included in this attachment do not count toward the page limit for the application. If a subcontractor will be used, this section must include letters of commitment from the subcontractor(s) and documentation of ability to fulfill the scope of work. The letters must specify the tasks to be performed by the subcontractor. Resumes and/or prospectuses are not required for clerical staff.

- (3) The application must include a description of the advisory feedback group or methods that will be used to determine if the program(s) and service(s) provided are meeting the needs of client school districts and county offices throughout the state. The application must also identify the process for involving districts and county offices of education in the testing and review process for new products and services, the monitoring of project activities, and the providing of advice about changes to better meet statewide needs. Any advisory group must meet the following criteria:
 - (a) Members must participate in such a manner that no state funds as a result of Education Code Chapter 5, Part 28, Article 15, commencing with Section 51870.5, entitled Education Technology (also known as AB 1761, Sweeney, Chapter 801, Statutes of

1998), may be used for travel expenses associated with the advisory group. If an exception to this provision is necessary to include a representative not otherwise able to participate, the service provider must submit consideration of this exception to the CDE for approval in advance of any travel.

- (b) A majority of the membership must be comprised of individuals who are direct receivers (or potential direct receivers) of the service(s) as opposed to providers or others.
- (c) A majority of the membership must be comprised of individuals who have not served in any state-related education technology advisory group prior to serving on the one proposed in the service application.
- (d) The membership must represent a wide range of constituent clients from diverse areas in the state. The membership must also represent the diverse ethnic composition of California. The membership must possess the deep technical skills to be able to accurately assist and advise on matters relevant to the accomplishment of the deliverables.

NOTE: Once the service provider has selected its advisory body, it must submit the names to the CDE for approval prior to any meetings.

d. Budget Narrative. (10 points, with up to 10 “bonus points” available)

The Budget Narrative section must include a justification for each of the costs on the Budget Forms (Forms SETS-E-1 and SETS-E-2) for each aspect of the Service Work Plan as well as the costs for project administration for all years of the project. Project administrative costs must include the preparation of the annual report for each year of the project. The Budget Narrative must include the basis for estimating the costs and specific page references back to the work or services described in the Service Work Plan.

If there is income, use Form SETS-E-2 to show its origin (Fees, LEA Contribution, Partner Income). In the Budget Narrative a clear plan for using this income against expenses must be described.

For employee salaries, the Budget Narrative must include the hourly or monthly rates for each employee as well as the total number of hours projected for this project. For this RFA, a "full time" employee is one who works no less than 210 paid workdays in a calendar year. Because each SETS is to offer its services year-round, staffing assignments must be made so that a sufficient number of staff responsible for delivery of services is available year-round.

For materials and supplies, equipment, and other expenses, the Budget Narrative must provide sufficient detail as to what will be purchased so as to allow the reviewers to judge the degree to which the budget is aligned with project activities. For example, the budget narrative should not simply state that \$5,000 has been allocated to "workshop supplies," but should rather state how many workshops are planned, what supplies will be needed for each workshop, and the cost of these supplies.

For travel other than the required state meetings, the budget narrative must clearly explain what the travel will be (i.e., the number of trips, destinations), the reason for the travel, and how this travel will enhance the quality of service being provided statewide. If the budget includes out-of-state travel, the total cost of each trip must be clearly identified in the budget narrative and the justification for the trip must be included in the Budget Narrative.

Applicants are encouraged to consider ways to develop and implement the most cost-effective program possible and to leverage existing programs and outside resources to the greatest extent possible. The Budget Narrative must clearly explain how leveraging will occur and how it will promote success of the project.

If the lead agency, consortium members, institutions of higher education, or business partners will contribute funding to the work or services described in the Service Work Plan, a description of these contributions should be included in the Budget Narrative.

Bonus Points: Up to five (5) additional bonus points may be awarded in this section, based on the extent to which the applicant can both (a) accomplish Phase 1 on schedule for less than the allocated \$174,900 and (b) use the savings for accomplishing the deliverables in Phase 2 in a more comprehensive manner. **In order to qualify for bonus points, the applicants must indicate in this section that its Phase 1 budget is based on a figure less than \$174,900.**

Bonus Points: Up to five (5) additional bonus points may be awarded in this section, based on the extent to which the applicant shows income or methods to move toward fiscal self-sufficiency. **In order to qualify for bonus points, the applicants must indicate in this section that its Year 2 budget (July 1, 2001 to June 30, 2002) is based on an income figure of more than \$300,000, with the funding above \$300,000 coming from project income or from private funding and provide evidence that the project income and/or private funding will increase over time.**

e. Budget Forms (Form SETS-E-1 and SETS-E-2). (5 points)

The Budget Form SETS-E-1 must identify the costs for each of the aspects of the Service Work Plan and overall administration of the project that will be supported with project funds for all years of the project. Budget Form SETS-E-2 must identify costs for each of the subsections of the Service Work Plan and overall administration of the project that will be supported with funds from other sources.

If one or more subcontractors will be used, each subcontractor's planned expenditures must be displayed in the same manner. The budgets for year 2 must include anticipated changes in staff, subcontractors, and consultant's salaries/fees.

f. Evaluation System. (10 points) In this section, the applicant must address the system whereby valid and reliable measures will be used in determining whether the project is meeting its goals. The CDE shall receive required reports (as shown in grid under "Required Reports") based on the evaluation system. At minimum, the system of evaluation and feedback must include:

- (1) a clear description of the evaluation system (types of evaluation and the basis for selecting them) and the process whereby the extent of performance as measured against the service's stated deliverables is known and communicated to the CDE and others as necessary;
- (2) a timeline for the evaluation system ensuring that results are known with sufficient regularity and reliability to be of demonstrable value in guiding the Service Work Plan;
- (3) the use of neutral, external, and disinterested parties in the final design, collection, and interpretation phases of the evaluation system; and
- (4) to the extent feasible, the use of advanced technologies in the evaluation system.

IV. REQUIRED REPORTS AND MEETINGS

A. Required Reports and Payment Information

Required Reports:

	Due	Phase 1 Year 1 May 2000 to September 2000	Phase 2 Year 1 October 2000 to June 2001	Year 2 July 2001 June 2002
Progress report to the CDE (the overall status)	December 1	No	Yes	Yes
Annual report** (evaluation results and more)	March 30	No	Yes	Yes
End-of-year financial report	August 1	Yes	Yes	Yes

**For year 1, the annual report must include any specific information requested by the CDE. For year 2, the annual report must include the results of the approved evaluation system as well as any specific information requested by the CDE. As a minimum, the degree to which service is being used must be clearly described. Lead agencies are invited to contact the CDE at any point to raise issues of concern.

B. Required Meetings

The project directors of each service will be required to attend up to eight (8) days of CDE-planned meetings in Sacramento each year. CDE anticipates that some of these meetings will be scheduled to coincide with other regional education technology meetings or events so as to minimize duplication of travel and allow for coordination among various service providers and others.

V. MISCELLANEOUS CONTRACT TERMS AND REQUIREMENTS

A. Standards for Acceptance of Products

All products must be in full compliance with Public Law 103-382 (Sections 3131-3135) and must be of high quality. All products must be submitted to the CDE in hard copy and electronically. Unless prior approval has been obtained from the CDE, the electronic resources must be formatted in such a way that they can be opened using a CDE standard machine and using one of the CDE's standard software packages. For this RFA the standard is PC Microsoft Office 97, Word 97.

B. Responsibilities of the CDE

Representatives from the Education Technology Office will monitor the work of the contractor and will be available for monthly meetings (which may be phone conferences or teleconferences) to answer questions and provide guidance; CDE will also respond to questions from the contractor. The CDE shall provide the contractor with any needed department publications or data.

C. The Nondiscrimination Compliance Statement (Std. 19) (Form SETS-F)

This form must be signed and dated with an original signature with each copy of the proposal.

D. Compliance Audit

The contractor must agree that the State or its designee will have the right to review, obtain, and copy all records pertaining to performance of the contract. The contractor must agree to provide the State or its designee with any relevant information requested and shall permit the State or its designee access to its premises, upon reasonable notice, during normal business hours for the purpose of interviewing employees and inspecting and copying such books, records, accounts, and other material that may be relevant to a matter under investigation for the purpose of determining compliance with this requirement. The contractor must further agree to maintain such records for a period of five years after final payment under the contract.

E. Staff Replacements

The contractor will be required to obtain prior approval from the CDE contract monitor before changing the project's director or lead.

F. Ownership of Materials

All materials developed under the terms of this agreement will become the property of the CDE. The CDE reserves the exclusive right to copyright such material and to publish, disseminate and otherwise use materials developed under the terms of this agreement.

G. Retention of Records

The contractor shall maintain accounting records and other evidence pertaining to costs incurred with the provision that they shall be kept available by the contractor during the contract period and thereafter for five full years from the date of the final payment. The CDE must be permitted to audit, review, and inspect the contractor's activities, books, documents, papers and records during progress of the work and for five years following final payment.

H. Anti-trust Claims (Government Code Sections 4552-4554)

In submitting a bid to a public purchasing body, the bidder offers and agrees that if the bid is accepted, it will assign to the purchasing body all rights, title and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 USC Section 15) or under the Cartwright Act (Chapter 2) commencing with Section 16700 of Part 2 of Division 7 of the Business and Professions Code, arising from purchases of goods, materials or services by the bidder for sale to the purchasing body pursuant to the bid. Such assignment shall be made and become effective at the time the purchasing body tenders final payment to the bidder.

If an awarding body or public purchasing body receives, either through judgment or settlement, a monetary recovery for a cause of action assigned under this chapter, the assignor shall be entitled to receive reimbursement for actual legal costs incurred and may, upon demand, recover from the public body any portion of the recovery, including treble damages, attributable to overcharges that were paid by the assignor but were not paid by the public body as part of the bid price, less the expenses incurred in obtaining that portion of the recovery.

Upon demand in writing by the assignor, the assignee shall, within one year from such demand, reassign the cause of action assigned under this part if the assignor has been or may have been injured by the violation of law for which the cause of action arose and (a) the assignee has not been injured thereby, or (b) the assignee declines to file a court action for the cause of action.

I. Recycled Paper Certification (Public Contract Code Sections 10308.5/10354)

By signing the contract, the contractor agrees to certify in writing to the CDE, under penalty of perjury, the minimum, if not exact, percentage of recycled content, both postconsumer material and secondary material as defined in Public Contract Code Sections 12161 and 12200, in materials, goods or supplies offered or products used in the performance of the contract, regardless of whether the product meets the required recycled product percentage as defined in Sections 12161 and 12200. The contractor may certify that the product contains zero recycled content.

VI. RATING CRITERIA AND EVALUATION

Step I: Application Format (Rated on a yes/no basis)

Applicant _____

Name _____

Service: **Professional Development & Resources for Technology Support Staff**

If more than one applicant for a service: Applications that do not comply with the format requirements will be disqualified from the competition. Disqualified applications will not be scored in Step II. Applicants will not be allowed to correct deficiencies and resubmit their application for consideration in this round of competition.

If only one applicant for a service: Applications that do not comply with the format requirements will be called on the telephone and informed of the error. To maintain their eligibility in this round of competition, applicants will be required to submit the missing or corrected item(s) via fax by 5 p.m. of the second business day following the day of the request from CDE.

- _____ 1. The applicant submitted an "Intent to Submit" form by the February 25, 2000, deadline.
- _____ 2. Fifteen (15) copies plus one original, for a total of sixteen (16), submitted by the March 7, 2000, deadline.
- _____ 3. All required components, forms, and attachments, including resumes for professional project staff and/or prospectus for project staff to be hired, are included.
- _____ 4. The title page is signed by an authorized representative.
- _____ 5. All pages, including all narratives, forms, and required attachments (including resumes for project staff and/or prospectus for project staff to be hired) are sequentially numbered. Note: Hand-written numbers are acceptable.
- _____ 6. All narrative pages of the Service Work Plan and budget narrative include line numbers. Pages are individually numbered, with the first line of each page being line #1. Note that resumes for project staff and/or prospectus for project staff to be hired and other required attachments are not considered part of the narrative and do not have to be line-numbered.
- _____ 7. All narrative pages of the Service Work Plan and budget narrative contain no more than 24 lines per page. If tables or graphics are included, number of lines of text on the page was decreased to provide for the tables or graphics. Additionally, any charts do not increase the word count for the page to exceed the number typically found on a page with 24 lines of text.
- _____ 8. The Service Work Plan narrative does not exceed fifteen (15) total pages, exclusive of the required forms, surveys, and resumes and/or prospectus for project staff to be hired.
- _____ 9. The budget narrative does not exceed four (4) pages, exclusive of required forms.

Step II: Professional Development & Resources for Technology Support Staff RFA Performance Evaluation Sheet

Applicant Name _____

Note: See “Service Work Plan” (III. C. 3) and Attachment 1, for the description of the requirements for this service.

Service Work Plan Section		Possible Points	Points Earned
A. Planning and coordination		15 points	_____
Degree to which the proposed planning and coordination for the project will ensure that the project has the capacity to predict needed services; to adjust and allocate resources and priorities to best deliver the service; to market the service to clients; and to work in concert with other appropriate educational technology programs to minimize duplication and maximize resources.			
B. Delivery of the identified SETS		40 points	_____
Successful applicants will be rated on the extent to which their described system answers these essential questions:			
Phase 1			
(a) How will the applicant work with key entities (both public and private) that have expert knowledge of the skills and resources needed by technology support staff in order to produce a description or matrix of those resources and skills? How will this development process address review and approval by CDE?			
Successful applicants will be rated on the extent to which their described system is designed to use existing quality sources so as to quickly produce a description or matrix of skills needed by technology support staff; a streamlined process that minimizes the re-creation of existing information is preferred.			
(b) How will the applicant establish and maintain a process throughout the life of the contract whereby the description or matrix will be amended, updated, and then reviewed by the CDE as new information becomes known?			
Successful applicants will be rated on the extent to which their described system regularly adds, deletes, and updates elements of the description or matrix that reflect the changing marketplace with respect to professional development opportunities and resources, as well as changes in technology. Such a system must include CDE review and approval.			

Applicant Name _____

Phase 2

- (a) How will the applicant use the description or matrix of those resources and skills approved by the CDE to identify existing skill-building professional development opportunities and resources for technology support staff?

Successful applicants will be rated on the extent to which their system is designed to identify and contact a large base of existing providers of professional development for technology support staff so as to gather the necessary evidence to permit an accurate correlation of their respective training content with the approved description or matrix of skills.

- (b) How will the contractor identify gaps between what is available and what is needed and work collaboratively with others to fill those gaps?

Successful applicants will be rated on the extent to which their system will identify gaps between what is available and what is needed and the extent to which the applicant will collaborate with other SETS contractors and/or others to fill the gaps. Successful applicants will be rated on the extent to which their system will prioritize the gaps and work to fill the highest priority gaps first.

- (c) How will the applicant locate, evaluate, and publish an easy-to-use set of resources on planning and installing common education technology infrastructure?

Successful applicants will be rated on the extent to which they will gather high quality resources and evaluate those resources to determine which best meet the needs of California schools. Successful applicants will also be rated on the extent to which they will publish templates of common education technology infrastructure models appropriate for most public K-12 district and school configurations and the extent to which each template will provide the district or school enough technical detail to be valuable yet be organized in such a manner as to be of use to the general staffs at schools and districts.

Applicant Name _____

- (d) How will the applicant publicize and disseminate the approved description or matrix of skills and resources needed by technology support staff, as well as professional development opportunities and resources to reach the widest audience of technology support staff?

Successful applicants will be rated on the extent to which the described systems will effectively disseminate the products of this service to the widest audience. Successful applicants will also be rated on the extent to which their system includes a feedback component enabling participating clients to supply evaluative commentary and suggestions back to this service.

C. Project management, staffing, and advisory

20 points _____

Degree to which the application provides specific information to ensure the efficient operation of the project and accomplishment of the Service Work Plan. Degree to which the proposed management structure will provide for ongoing project monitoring and oversight. Degree to which the application demonstrates that the proposed staff have the ability to deliver the services and develop the products described in the Service Work Plan. Degree to which the advisory process will ensure that the project addresses the range of needs in California, including needs based upon size of district, geography, technical sophistication, and other factors. Degree to which the advisory process will help to ensure that the products and services are of high quality through input in the planning and development as well as the review and testing of products and services.

D. Budget narrative

10 points _____

Degree to which the project will use funds to support successful accomplishment of the activities described in the Service Work Plan. Degree to which the application provides clear justification for the administrative costs and for the project activity costs. Degree to which the justification matches the Service Work Plan.

(Bonus points, Phase 1)

(Up to 5 points _____)

Bonus Points: Up to five (5) additional bonus points may be awarded in this section, based on the extent to which the applicant can both (a) accomplish Phase 1 on schedule for less than the allocated \$174,900 and (b) use the savings for

Step II: Professional Development & Resources for Technology Support Staff RFA Performance Evaluation Sheet,
page 4

Applicant Name _____

accomplishing the deliverables in Phase 2 in a more comprehensive manner. **In order to qualify for bonus points, the applicants must indicate in this section that its Phase 1 budget is based on a figure less than \$174,900.**

(Bonus points, Year 2)

(Up to 5 points _____)

Bonus Points: Up to five (5) additional bonus points may be awarded in this section, based on the extent to which the applicant shows income or methods to move toward fiscal self-sufficiency. **In order to qualify for bonus points, the applicants must indicate in this section that its Year 2 budget (July 1, 2001 to June 30, 2002) is based on an income figure of more than \$300,000, with the funding above \$300,000 coming from project income or from private funding and provide evidence that the project income and/or private funding will increase over time.**

E. Budget forms

5 points _____

Degree to which the planned expenditures match the Service Work Plan and provide sufficient support for project activities. Degree to which funding is used to develop the products and services called for in the RFA. Degree to which the plan provides a cost-effective approach to delivering the needed services and products.

F. Evaluation system

10 points _____

Degree to which the proposed evaluation system will ensure that the project has the capacity to collect valid and reliable measures to determine if the project is meeting its goals. Degree to which the timeline for the evaluation system ensures that unbiased information is collected with sufficient regularity and reliability to be of demonstrable value in guiding the project. Degree to which advanced technologies are used in the evaluation system.

TOTAL

100 points _____

Reader's name _____ Signature _____ Date _____

Printed

Appendix I: Required Forms

Application forms for the Statewide Education Technology Services:

The forms listed below are available in PDF format under the Education Technology Office's Web site:
<http://www.cde.ca.gov/sets/>

SETS-A	Intent to Submit
SETS-B	Application Title Page
SETS-C	Drug-Free Workplace Certification
SETS-D	Professional Staff by Project Activity
SETS-E-1	Budget Form: Expenditures from Contract Funds
SETS-E-2	Budget Form: Income and Expenditures from Fees, the Lead Agency or Partners

The following forms are available in PDF format on the Office of State Printing's Web site:

SETS-F	Nondiscrimination Compliance Statement (Std. 19): http://www.osp.ca.gov/fmc/html/pdfforms/std019.pdf
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Note: Form SETS-F is not posted on the CDE Web site as part of this RFA. Applicants that obtained their copy of the RFA from the CDE Web site should get a copy of this form from the Web site shown above, or from the Education Technology Office of CDE by calling (916) 323-5715 and requesting a copy.

SETS-A: Intent to Submit Statewide Education Technology Services (SETS)

Due: Friday, February 25, 2000

Please fax this form to the number below so it is received no later than 5 p.m. on Friday, February 25, 2000. Districts and County Offices of Education returning this form will be mailed copies of any substantive questions regarding the RFA for Statewide Education Technology Services

Failure to return this Intent to Submit form by the due date will disqualify the district or county office from participating in this application process.

Return to:
Education Technology Office
California Department of Education
Fax to (916) 323-5110

DEPT. OF EDUCATION USE ONLY	
Application Number	Fiscal Year
	2000

Lead Agency _____

CDS Code _____ Address _____

Statewide service.

Professional Development & Resources for Technology Support Staff

Contact person _____ Title _____

FAX: _____ Phone _____ E-mail _____

Signature of Authorized Representative Date

SETS-B: Application Title Page

Statewide Education Technology Services (SETS)

Return to:

California Department of Education
 Education Technology Office

515 L Street, Suite 250
 Sacramento, CA 95814

DEPT. OF EDUCATION USE ONLY	
Application Number	Fiscal Year
	2000

APPLICATION DEADLINE: Tuesday, March 7, 2000

**County/District
Code**

		County	District			
Program: Statewide Education Technology Service Professional Development & Resources for Technology Support Staff		Total State Funds Requested in Year 1				
Primary Contact Person	Telephone Number	Email address				
Lead Agency Name		Fax number				
Address		City				
CERTIFICATION/ASSURANCE SECTION: I hereby certify that all applicable state rules and regulations will be observed and that, to the best of my knowledge, the information contained in this application is correct and complete.		Zip Code				
Printed Name of Superintendent or Designee		Telephone Number				
Superintendent's or Designee's Signature		Date				

SETS-C: Drug-Free Workplace Certification

COMPANY/ORGANIZATION NAME

The contractor or grant recipient named above hereby certifies compliance with Government Code Section 8355 in matters relating to providing a drug-free workplace. The above named contractor or grant recipient will:

1. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations, as required by Government Code Section 8355(a).
2. Establish a Drug-Free Awareness Program as required by Government Code Section 8355(b) to inform employees about all of the following:
 - (a) the dangers of drug abuse in the workplace;
 - (b) the person's organization's policy of maintaining a drug-free workplace;
 - (c) any available counseling, rehabilitation and employee assistance programs; and
 - (d) penalties that may be imposed upon employees for drug abuse violations.
3. Provide as required by Government Code Section 8355(c), that every employee who works on the proposed contract or grant:
 - (a) will receive a copy of the company's drug-free policy statement, and
 - (b) will agree to abide by the terms of the company's statement as a condition of employment on the contract or grant.

CERTIFICATION

I, the official named below, hereby swear that I am duly authorized legally to bind the contractor or grant recipient to the above described certification. I am fully aware that this certification, executed on the date and in the county below, is made under penalty of perjury under the laws of the State of California.

Official's Name

Date Executed

Executed in the County of

Contractor or Grant Recipient Signature

Title


Federal I.D. Number

SETS-D: Professional Staff by Project Activity Statewide Education Technology Services (SETS)

Statewide service.

Professional Development & Resources for Technology Support Staff

Year _____ **of** **2**

Staff Name						
Title						
Agency						
FTE on this project						
Hours to be worked during the fiscal year by activity						
List Activities Here 						

Page _____ of _____

Note: Duplicate this form and submit as many forms as are necessary to include all staff for each year of the project.

SETS-E-1: Budget Form: Expenditures from Contract Funds Statewide Education Technology Services (SETS)

Year _____ of 2

Note: The amounts requested are to be explained in the Budget Narrative

Major Object of Expenditure Categories	Planning and coordination	Delivery of service	Evaluation	Project Administration	Other (Identify)	Total Cost
1000-2000 Certificated Personnel Salaries						
2000-2999 Classified Personnel Salaries						
3000-3999 Employee Benefits						
4000-4999 Books and Supplies						
5100 and 5300- 5999 Services and Other Operating Expenditures						
5200 Employee Travel						
Indirect Costs at established rate (excluding the 6000-6999 category)						
6000-6999 Capital Outlay						
Total Costs						

I certify that I have reviewed this budget and find it to be consistent with the Service Work Plan.

 Signature of the Assistant Superintendent of Business

 Title

Page _____ of _____

Note: Duplicate this form and submit one form for each of the two years of the project.

SETS-E-2: Budget Form: Income and Expenditures from Fees, the Lead Agency or Partners

Statewide Education Technology Services (SETS)

Year _____ of 2

Note: The amounts listed below are to be explained in the Budget Narrative

Major Object of Income & Expenditure Categories	Planning and coordination	Delivery of service	Evaluation	Project Administration	Other (Identify)	Total Cost
8000-8999 Fee Income LEA Contrib. Partner Income						
1000-2000 Certificated Personnel Salaries						
2000-2999 Classified Personnel Salaries						
3000-3999 Employee Benefits						
4000-4999 Books / Supplies						
5100 and 5300-5999 Services and Other Operating Expenditures						
5200 Employee Travel						
Indirect Costs at established rate (excluding the 6000-6999 category)						
6000-6999 Capital Outlay						
Total Costs						

I certify that I have reviewed this budget and find it to be consistent with the Service Work Plan.

Signature of the Assistant Superintendent of Business

Title

Page _____ of _____

Note: Duplicate this form and submit one form for each of the two years of the project.

SETS-F: Nondiscrimination Compliance Statement

Appendix II: Attachments

Attachments for the Statewide Education Technology Services are:

Attachment 1	Additional Information Regarding Professional Development and Resources for Technology Resources Staff Statewide Service
Attachment 2	Applicant's Checklist
Attachment 3	Travel Experience Reimbursement: A Summary of the State of California Travel Program
Attachment 4	Sample Matrix

Attachment 1: Additional Information Regarding Professional Development and Resources for Technology Support Staff

*Note: The following sections provide detailed descriptions of various aspects of this application (definitions, planning specifications and templates, and suggested approaches). **Although it is recognized that not all of these descriptions and expectations may be fully met, the extent to which an applicant accounts for these aspects will be a part of the scoring consideration when points are awarded on “Delivery of the SETS,” Pages 22-25.***

I. Definitions

For this RFA, **technology support staff** shall be defined as public school employees who give assistance to others with installation, maintenance, and repair of common technology infrastructures for all staff using education technologies.

For this RFA, **professional development opportunities** shall be defined as any form of training, skills-acquisition, or job-related growth specifically tailored to the needs of those school employees whose primary responsibilities include technology support.

For this RFA, **common education technology infrastructures** shall be defined as the hardware and its operating system software that, together, comprise a network -- a “network” may be a local or wide area network, an intranet, or the Internet.

For this RFA, **support tools and resources** shall be defined together as at least these components:

1. Published guides for successful education technology planning, including sample plans or plan language. The guides and samples must meet or exceed all state and federal education technology planning requirements (such as those in use by Digital High School, Technology Literacy Challenge, E-rate, and others). The guides and samples that address instructional planning must conform to current California state content standards. All sample plans must include components for efficient and effective financial sustainability.
2. Published templates of the common education technology infrastructure models appropriate for most public K-12 district and school configurations, designed in collaboration with the CDE and based on standards for the components and systems that are industry-compatible and provide the capacity for expansion or growth.

For this RFA, **published** shall be defined as produced and distributed in print form and accessible from the Internet in a user-friendly manner. Each K-12 public school and county office of education shall receive at least two (2) sets of the printed resources and of each subsequent updated revision.

For this RFA, **template** shall be defined as topological descriptions and diagrams of common technology infrastructures for education, also known as detailed schematics.

II. Planning specifications and templates

Successful applicants will locate, evaluate, and publish an easy-to-use set of support tools and resources that districts and schools can use to plan and install common education technology infrastructures. Successful applicants must explain how districts and schools will be encouraged to use these resources with Boards, parents, employees, students, and vendors. Successful applicants must

explain how districts and schools will be encouraged to use these resources in preparing education technology documents for other state or federally funded programs that require technology plans or infrastructure descriptions.

Successful applicants will publish templates of the common education technology infrastructure models appropriate for most public K-12 district and school configurations, based on standards for the components and systems that are industry-compatible and provide the capacity for expansion or growth. Each template must provide the district or school enough technical detail to be valuable in bidding and installing education technology infrastructures yet be organized in such a manner as to be of use to the general staffs at schools and districts. A sample of the types of infrastructure models is shown below:

Districts in small and rural communities, with possible higher costs for Internet access at higher bandwidths

- (1) One typical of a larger district (over 10 sites)
- (2) One typical of a medium district (3-9 sites)
- (3) One typical of smaller district (1-2 sites)

Districts in larger suburban or urban communities, with possible lower costs for Internet access at higher bandwidths

- (4) One typical of a larger district (over 40 sites)
- (5) One typical of a medium district (10-39 sites)
- (6) One typical of smaller district (less than 10 sites)

Schools in small and rural communities, with possible higher costs for Internet access at higher bandwidths

- (7) One typical of large school (over 1,300 students)
- (8) One typical of medium school (300-1,300 students)
- (9) One typical of small school (under 300 students)

Schools in larger suburban or urban communities, with possible lower costs for Internet access at higher bandwidths

- (10) One typical of large school (over 2,000 students)
- (11) One typical of medium school (500-2,000 students)
- (12) One typical of small school (under 500 students)

The CDE shall review and approve all final drafts prior to publication. The applicant may propose to combine the deliverables of this service into one sequential or linked document, or the applicant may propose that each resource will be separately published and maintained. Regardless of the model, all minimums and criteria still apply.

III. Suggested Approaches

In the Service Work Plan, Section IIIC3 of the application, the applicant must address how the service will be delivered to accomplish the outcomes and develop the deliverables. The successful applicant shall provide in that section, to the extent possible, responses that align with these aspects of the major deliverables.

Phase 1

Collaborating

Successful applicants will describe and be prepared to use a system that draws from the collective expertise of recognized entities, both public and private, in producing a description or matrix of skills needed by technology support staff.

Updating

Successful applicants will describe how their system regularly adds, deletes, and updates elements of the description or matrix so as to reflect the changing marketplace with respect to professional development opportunities and resources, as well as changes in technology. Successful applicants will describe a process for CDE review and approval.

Phase 2

Identifying

Successful applicants will describe and be prepared to use a system that assigns responsibility to those providing existing professional development to submit sufficient evidence to permit the operators of this service to accurately correlate their training content with the approved description or matrix of skills.

Publicizing and disseminating

Successful applicants will describe and be prepared to use various systems of communication, such as but not limited to technologist organizations' media, the CDE, other SETS, CCSESA (California County Superintendents Educational Services Association), organizations which represent employees, and entities supporting education technology, in a manner that results in regular, planned promotional coverage in all areas of the state and across all titles of technology support staff.

Attachment 2: Applicant's Checklist

Due by Friday, February 25, 2000 – Submit 1 copy and 1 original

- ☐ Intent to Submit (Form SETS-A)

Due by Tuesday, March 7, 2000 – Submit 15 copies and 1 original

- ☐ Application Title Page (Form SETS-B)
- ☐ Drug-Free Workplace Certification (Form SETS-C)
- ☐ Service Work Plan
- ☐ Professional Staff by Project Activity (Form SETS-D)
- ☐ Budget Forms (Form SETS-E-1 and SETS-E-2)
- ☐ Organization Chart (label as Attachment 1)
- ☐ Resumes for professional personnel and/or prospectus for project staff to be hired (label as Attachment 2)
- ☐ Nondiscrimination Compliance Statement (Std. 19) (Form SETS-F)

Attachment 3: Travel Expense Reimbursement

NOTE: This is excerpted from the California Department of Personnel Administration's brochure titled "A Summary of the State of California Short-Term Travel Expense Reimbursement Program," updated 11-02-99. **CDE contractors and others whose funding requires use of "state rates" are to use this when planning for travel reimbursement.**

CALIFORNIA STATE TRAVEL PROGRAM CONDITIONS OF TRAVEL

Each State agency determines the necessity for and the method of employee business travel. Effective 1/1/92, reimbursement shall not be made for meal and lodging expenses incurred within 50 miles of home or headquarters. Authority to approve exceptions was delegated to appointing powers as follows: to approve meals and/or lodging for employees *on travel status* away from, but within 50 miles of home or headquarters. Delegation does not extend to the approval of meals or lodging **at** either the home or headquarters location.

SHORT-TERM TRAVEL

LODGING REIMBURSEMENT RATES – IN STATE

Applicable when State business requires an overnight stay and the employee uses a good, moderately priced commercial lodging establishment (*hotel, motel, bed and breakfast or public campground*) that caters to the short-term traveler, and for day trips of less than 24 hours.

HINTS: Use the 1999/2000 LODGING TRAVEL GUIDE! <http://www.travelcsq.com> It's full of good lodging establishments priced within State rates. Present the TAX WAIVER FORM when you check in. They are not required to waive the tax. **KEEP YOUR RECEIPTS. RATES EFFECTIVE 11/2/99:**

LODGING REIMBURSEMENT – receipt required

Statewide, Except as below,* **up to \$84.00 + tax**



*San Francisco, Alameda, San Mateo and Santa Clara Counties, and Central/Western LA** **up to \$110.00 + tax**

**LA area within borders of Suns Blvd. (North), Pacific Ocean (West), Imperial Blvd/Fwy 105 (South), and Fwys 110, 10 and 101 (East).

Note: Get a confirmation number when you make your reservations and use it when you check in. Travelers who do not provide a lodging receipt are eligible to claim meals/incidentals only as appropriate to the time frames of travel. (See below for rates and time frames.)

MEALS AND INCIDENTALS (each 24 hr. period)

Breakfast: ACTUAL EXPENSE UP TO \$ 6.00

Lunch: " 10.00

Dinner " 18.00

Incidentals " 6.00

Note: YOU must retain all meal receipts for audit by the state or the IRS.

TIMEFRAMES:

FIRST DAY: TRIP OF MORE THAN 24 HOURS:

Trip begins at or before 6am: may claim breakfast

Trip begins at or before 11am: may claim lunch

Trip begins at or before 5pm: may claim dinner

FRACTIONAL DAY: AFTER 24 HOURS OF TRAVEL:

Trip ends at or after 8am: may claim breakfast

Trip ends at or after 2pm: may claim lunch

Trip ends at or after 7pm: may claim dinner

FRACTIONAL DAY-TRIP OF LESS THAN 24 HOURS:

Trip must begin at or before 6am AND end at or after 9am in order to claim breakfast.

Trip must begin at or before 4pm AND end at or after 7pm in order to claim dinner.
No lunch or incidentals may be claimed. If there is no overnight stay, these meals are taxable.

NOTE: Full meals included in airfare, hotel, and conference fees, or otherwise provided may not also be claimed for reimbursement. The same meal may not be claimed more than once on any date. Continental breakfasts of rolls, coffee, and juice are not considered full meals.

CONFERENCES/CONVENTIONS: Rooms that are contracted by the sponsors for the event.

STATE SPONSORED:

Appointing power delegated to approve lodging with receipt: up to \$110 + tax

NON-STATE SPONSORED:

Appointing power delegated to approve lodging with receipt up to the rate contracted for the event.

OUT-OF-STATE TRAVEL

Lodging w/receipt: actual expense (subject to department approval)

Meals/incidentals: same rates/requirements has in-state reimbursement

OUT-OF-COUNTRY TRAVEL

Lodging w/receipt: actual expense (w/appvl.)

Meals/incidentals: as published by the U.S. Govt. for dates and places traveled. Call DPA for rates.

MILEAGE REIMBURSEMENT RATES

All privately owned vehicle mileage driven on State business is subject to advance approval by the appointing authority. The rate claimed shall be considered full reimbursement for all costs related to the operation and maintenance of the vehicle, including both liability and comprehensive insurance.

Automobile	31 cents per mile
Spec. veh. w/cert up to	37 cents per mile
Private aircraft up to	50 cents per mile
Bicycle up to	4 cents per mile

If dropped off and picked up at a common carrier and no parking expense is claimed, mileage to and from the common carrier may be claimed at the above appropriate rate times twice the number of miles you actually occupy the vehicle (pays for each round trip).

TRANSPORTATION

Reimbursement for transportation expenses will be only for the method of transportation that is in the best interest of the State, considering both direct expense and the employee's time. The Department of General Services, Office of Fleet Management, manages the State car fleet and enters into contracts with airlines for reduced city pair rates and with rental car vendors for guaranteed daily rates for use on State business. When an employee chooses a method of transportation that is more costly than the normal method of travel, (driving a personal vehicle instead of flying) reimbursement will be the lower amount.

<p>NOTE: This is excerpted from the California Department of Personnel Administration's brochure titled "A Summary of the State of California Short-Term Travel Expense Reimbursement Program," updated 11-02-99. CDE contractors and others whose funding requires use of "state rates" are to use this when planning for travel reimbursement.</p>
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Attachment 4: Sample "Description or Matrix" of Technology Support Staff Skills

This is a sample of the "description or matrix" referred to in the RFA. It is based on the widely-recognized CTAP model for teacher proficiencies in education technology. A description or matrix of this type would be resident in a database program, allowing for queries, sorting, and report retrieval. This sample shown is arranged by type of technology support role (job). The successful applicant's responsibility will be to identify the numerous other skills (column 1) and accompanying levels of mastery (columns 2-5).

SKILL	Introductory Level Part-time support role (Examples: Site-based teacher who troubleshoots systems part-time; classified employee whose duties include part-time technology support.)	Standard Level Full time support role (Examples: Site-based teacher who is released full time to support systems; classified employee whose full-time duties are in technology support.)	Master level Full time support role (Examples: District or multi-site employee who leads technology support. May require special technical certification; may involve supervising the work of others and/or training others.)	Administrative / Planning (Examples: Site, multi-site, or district managerial employee responsible for technology support, planning, and integration with other priorities. Supervises the work of others and leads the institution's overall technology policies.)
		Assumes <u>all skills</u> in Introductory level, plus these:	Assumes <u>all skills</u> in Standard level, plus these:	Assumes <u>general understanding</u> of skills in other levels, plus these:
Static IP addressing (↑ <i>Example of 1 skill only</i>) (Numerous other skills follow in separate rows below ↓)	1. Knows what IP numbers are and how their use affects most end-user equipment. 2. Knows how to acquire new IP numbers and assign them to end-user equipment.	1. Knows the packet basis for TCP/IP and the functions of DNS, WINS, and other related protocol tools and setup standards. 2. Knows how to acquire new IP numbers and use them in basic router set-up and in common topological network designs. 3. Is familiar with network effects of using static IP addressing.	1. Knows how to acquire new IP blocks form InterNIC and how to maintain all-network IP mapping and router address tables. 2. Knows how to use network management tools such as OpenView. 3. Knows uses of BOOTP, DHCP, and similar standards. 4. Can convert a static IP network to a dynamic one and explain the benefits and drawbacks of doing so. 5. Is familiar with new IP addressing models to remedy current 11-digit shortfall.	1. Knows about TCI/IP and IP addressing related to best-practices in network planning. 2. Knows how to read a topologic diagram that specifies static vs. dynamic IP addressing at various junctures. 3. Understands the issues concerning IP addressing on the workload of technology support personnel being supervised. 4. Knows who to ask for accurate information on static IP addressing. 5. Knows where to send personnel for accurate training on IP addressing systems.